

# System Admin Menu

If you are a Superuser, you will be able to access the **System Admin** area of Tractivity through your normal login.

- 1. To access System Admin; at the very top of your Tractivity page. Please click into 'System Admin'.
- 2. Once within System Admin; you can find the menu on the left-hand side.
- 3. To access any areas of System Admin, click the red link of the option you wish to edit/view or amend.

Client Confidential





НОМЕ	CALEND	AR BUII	LDINGS	ORGANISATION	NS & CONTA	CTS E	ENQUIRIES	ISSUE	S STAK	EHOLDER MAPPING	STRATEGY PLANS	SURVEYS	
LAND P	ARCELS	LIBRARY	DISTR	RIBUTION LISTS	EVENTS	EMAIL	MAILSHO	TS R	EPORTS				

Client Name

Optionally apply per user

Yes

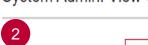
### System Admin: View Client

Name

Address

Allow Project Tiering?

Multi-Factor Authentication (2)



#### Add New:

- Add User
- Add Project

#### Client:

- View Client
- Edit Client

- Send Preferences Email

#### Communication:

#### Stakeholders:

- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

#### Configuration:

- Field Configuration

Users (54)	Projects (41)					
Title		Last Access	Account Status	System Admin	Edit	Remove
Adamson, Vi	cky	26/10/2023	Active	Yes	Edit	Remove

Systems House Ashford Road Bakewell Derbyshire DE45 1GT











# **External Forms**

External forms are editable forms that you can send either internally or externally to gather stakeholders' details - that once inputted into the form, will create a contact/organisation or even an activity.

External forms are sent via URL and can be copied into an email or how you see fit to send out to your requested audience.

- 1. External forms can be found by **superusers** within the system admin left-hand side menu. Under **Configuration > External Forms.**
- 2. This will show a list of all current External Forms that have been created. To create a new External Form -Click Add New Form under Add New.

Client Confidential

#### System Admin: List External Forms

Q

#### Add New:

Add New Form

#### **External Forms**

- All Forms

#### Client:

- View Client

### Stakeholders:

- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

#### Configuration:

- Field Configuration
- Global System Data
- Project System Data - Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration

#### External Forms

- Stakeholder Mapping Attributes
- SMS Configuration
- IP Configuration
- Manage API Credentials
- SSO Identity Providers

	Title	Project	Preview	URL	Added By	Last Edited By	
	Anna Test Form	2. Hull	Preview	View - Copy	Tunnicliffe, Anna 05/08/2021	Adamson, Vicky 08/10/2021	Archive
	Contact Newsletter Signup	2. Hull	Preview	View - Copy	Keep, Tom 18/08/2020	Adamson, Vicky 05/09/2023	Archive
	Contact Newsletter Subscribe in Forrm	Training Project (Do Not Use)	Preview	View - Copy	Tunnicliffe, Anna 02/02/2022	Adamson, Vicky 11/11/2022	Archive
	Contact Us Form	Customer Success Team Training	Preview	View - Copy	Adamson, Vicky 14/02/2023	Adamson, Vicky 14/02/2023	Archive
	Ebony - External Form Test	Ebony	Preview	View - Copy	Dabreo, Ebony 17/01/2023	Dabreo, Ebony 17/01/2023	Archive
	Ebony - Newsletter Sign up form	Ebony	Preview	View - Copy	Dabreo, Ebony 27/01/2023	Dabreo, Ebony 27/01/2023	Archive
	EEH Test newsletter sign up form	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 18/05/2022	Sandhu, Jaz 18/05/2022	Archive
S	Feedback Form	Energy	Preview	View - Copy	Swift, Caroline 07/07/2023	Swift, Caroline 07/07/2023	Archive
	GWR TEST	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 07/04/2022	Sandhu, Jaz 07/04/2022	Archive
	Gwynt Glas - test	Training Project (Do Not Use)	Preview	View - Copy	Sandhu, Jaz 05/07/2022	Sandhu, Jaz 05/07/2022	Archive
	Kate Test Sign up form	Kate's Project	Preview	View - Copy	Martin, Kate 27/10/2023	Martin, Kate 27/10/2023	Archive
	Keeping In Touch	Training Project (Do Not Use)	Preview	View - Copy	Rodgers, Thom 05/09/2023	Rodgers, Thom 05/09/2023	Archive

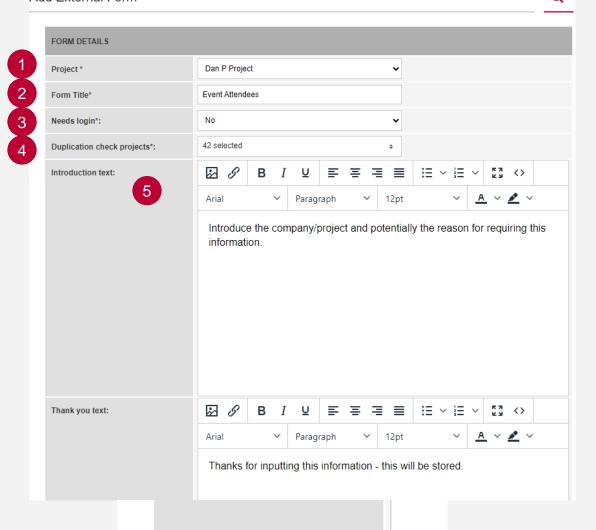
# How to add an External Form

Once you have clicked into Add New Form – You will be shown a Form Details page, where you have some options to add some customisation to the form.

- 1. You must select the **project** any responses will be added to.
- 2. You must input a **Form Title**, which will appear in the External Form list for future reference.
- 3. Needs login is for internal use only. If you are gathering external stakeholders, this would always be no.
- 4. Once any responses have been received, you can choose to check for duplicates in other projects to ensure no stakeholder is in twice.
- 5. You can input your own introduction and thank you text as you wish this is visible to the form user. You can also input your own branding using the **picture** icon.
- 6. To save the changes you have made and continue with adding the form, click **Add**.

Client Confidential

#### Add External Form







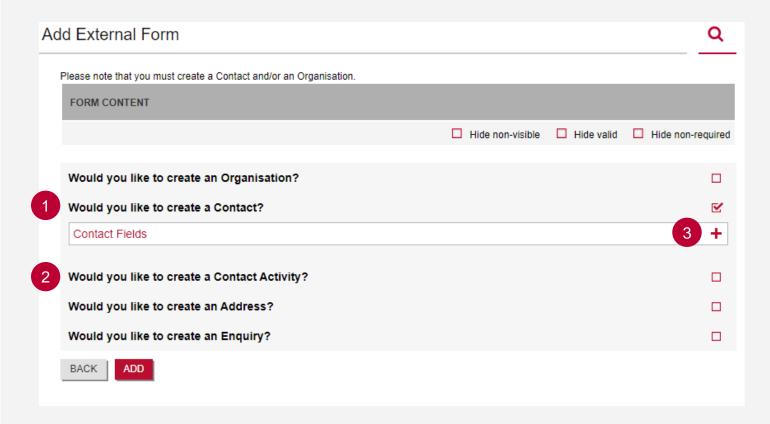
# Customise Fields on External Form

When creating an external form, you must be gathering information for either a contact or an organisation.

Once selected, you can then choose whether you would like to create an activity also.

- 1. Select whether you would like to create an **Organisation** or **Contact**. Using the tick box.
- 2. If applicable, choose whether you would like to create activity/enquiry.
- **3. Expand** the drop-down fields using the **+ icon** to view the external form questions.

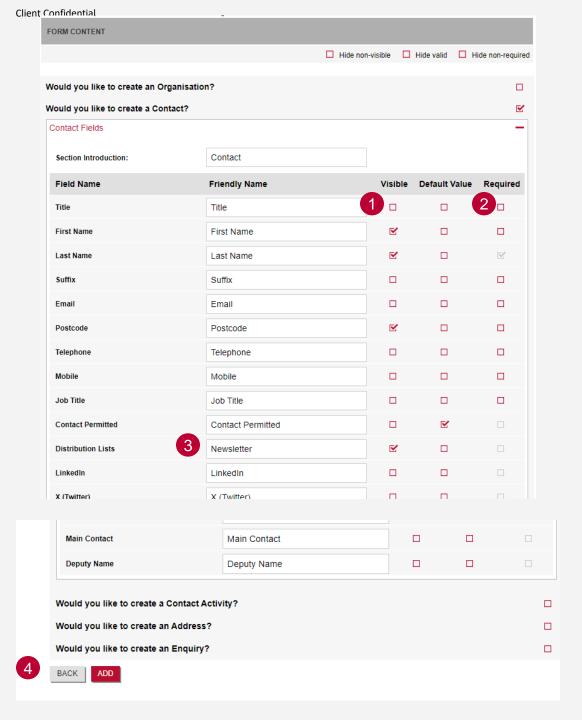
Client Confidential



# Customise Fields on External Form - Continued

Once you have expanded the field; you'll be shown all the **Fields** that you can gather in your form. You can switch these options on/off as you wish.

- 1. **Visible** Tick this option if you would like the field to be shown on your external form.
- 2. **Required** If you would like a question to be mandatory, tick this box and the question will have to be answered before being submitted.
- 3. **Friendly Name** We understand that not all language within Tractivity may be understood by stakeholders or used differently. You can change the 'Friendly Name' as you wish. For example, in the screenshot attached **Distribution List** has been amended to **Newsletter**.
- 4. Once you have configured the form as you wish; click **add** to ensure it's **saved**. (At the bottom of this page)



Dan P Project

## View and Send External Form

Once you have added the External Form you will be taken back to the External Forms list within System Admin.

Find the External Form you just created from the list (under title) and you will now be able to view/edit or access the URL.

- 1. **Preview** Clicking this will take you to view the external form you have created. You cannot share the URL from this preview page as any submissions will not be saved. (see screenshot attached for example)
- 2. View Clicking this will provide the live URL link which can you can share across to whom you wish.
- 3. Copy Will automatically copy the URL of the external form without showing how this would look for you add send out via email or however you desire.
- 4. Title Clicking the title will take you back to edit the external form. You can amend any of the configuration, name or text you have added.
- **5. Archive** You can soft delete the external form at any time using this.





Preview







Page, Dan 01/11/2023



Contact	
Last Name (required)	
Job Title (required)	
Contact Permitted	☑ Email
	✓ Post
	✓ SMS
	▼ Telephone
Distribution Lists	☐ Councillors distribution list
	☐ Landowner distribution list
Project Categories (required)	☐ Business Representative
	□ Councillor
	□ Fisherman
	☐ General Public
	□ Local Resident
	☐ Member of Parliament

